

## Summary of TSDAC Policy Principles

~~June 26~~ July 30, 2018

### Priorities:

- The priority for transit capital investment is to attain and maintain a state of good repair for transit assets. With that in mind, there are needs beyond state of good repair that would enhance transit utilization, efficiency, and reduce congestion that should be considered for funding through the transit capital program.
- Regardless of the structure established to fund state of good repair, minor enhancement, and major expansion projects, the CTB will have the discretion to move funding annually from major expansion and minor enhancement to meet state of good repair needs.
- The application, scoring, and prioritization will be conducted in an open and transparent manner.
- Maintain simplicity of existing process, utilizing available data sources/processes to the extent possible.

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### Program Structure:

- State of Good Repair (SGR) projects involve the replacement of existing assets at the end of their useful life. The majority of the program is focused on SGR related replacements.
- Minor Enhancement (MIN) projects are new, small increases in system assets that are, less than \$2 million in total cost, less than 5% increase in total fleet, or no more than 5 expansion vehicles (whichever is larger). Examples of minor enhancement projects include deployment of new technologies, purchase of additional revenue vehicles to increase spare ratios or reduce headways, or assets needed to make modest expansions of transit service. The CTB should have the discretion to set aside funding (not to exceed 10% of the funding allocated for state of good repair projects) to support minor enhancements.
  - Additional paratransit vehicles necessary to meet increased demand for this federally required service will be scored as Minor Enhancement projects, regardless of the number of vehicles requested. Additional information, including ridership/demand for service, may be required to support applications that exceed the minor enhancement threshold.
- Major Expansions (MAJ) are significant increases in service or infrastructure improvements that are beyond the definition of MIN projects. The Revenue Advisory Board recommended that up to 20% of the capital program could be used for Major Expansion projects in any year.

### Project Scoring:

- State of Good Repair (SGR): Projects will be scored on a 100 point scale with 60 points attributed based on age/condition of the asset and 40 points attributed based on service quality/impact.
  - Transit agencies, as part of their asset management plans, should be identifying assets for replacement in consideration of the procurement and manufacturing timeline associated with the asset. The capital application tool will extrapolate expected age/mileage at the time of replacement to support decision making.

- Replacement age will be determined based on Federal Transit Administration established life cycle benchmarks. Midlife overhauls will be considered as a state of good repair project and will add to the asset life cycle in accordance with FTA established benchmarks.
- For vehicles, the age/condition points will be awarded based on a combination score (50% based on age and 50% based on mileage). Asset age and condition data will be drawn from the TransAM asset management system.
- Points will be awarded based on age and mileage at the time of application, ~~until the SGR backlog is reduced.~~
- Minor Enhancement (MIN): Projects will be scored on a 40 point scale based on service quality/impact of the investment.
- Major Expansion (MAJ):
  - Weighting – The factor areas will be weighted based on the typology utilized for the project location in the SMART SCALE process.
    - Transit Agencies, in coordination with their respective MPOs, will have an opportunity to validate their weighting typologies prior to implementation of transit capital prioritization. Any requests for changes will apply regionally and require endorsement of the local MPO and approval by the CTB.
  - Measures –
    - Congestion Mitigation – Change in transit system ridership attributed to the project
    - Economic Development - Project consistency with regional and local economic development plans and policies and support for local development activity and development sites within walking distance of the project
    - Accessibility - Projected improvement in transit travel time to jobs and workforce development; and disadvantaged population (low-income, minority, or limited-English proficiency) within walking distance of project (1/4 mile)
    - Safety - Contribution to improving safety and security and reducing the risk of fatalities or injuries
    - Environmental Impact – Potential of project to improve air quality and reduce emissions as measured through VMT reduction
    - Land Use – Transit-supportive land use in the project corridor (walking distance)

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#### **Match Rates:**

- State of Good Repair (SGR) & Minor Expansion (MIN): In order to provide predictability and to ensure projects are funded at a level sufficient for projects to move forward, a 68% match rate is proposed for all assets.
- Major Expansion (MAJ): The Revenue Advisory Board recommended a maximum match rate of 50% for major expansion projects.

#### Eligibility Criteria:

- Applications from agencies that exhibit poor fleet maintenance or asset management as documented in comparison to their local Transit Asset Management Plan or audit findings may be deferred until corrective actions are demonstrated.

#### Program Support:

- DRPT will provide technical assistance and support to applicants as they prepare applications.
- In order to maintain objectivity and consistency in application of the prioritization criteria and measures, all metrics will be calculated by DRPT staff or DRPT led consultants.
- Following the FY20 grant cycle, DRPT will evaluate potential modifications to the grant cycle for major expansion projects to provide additional time for project evaluation and technical assistance.

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#### Program Evaluation:

- DRPT will summarize the outcomes of implementation annually and will revisit the process at least once every three years. DRPT will consult with TSDAC, Transit Agencies, MPOs, and local government prior to making recommendations to the Commonwealth Transportation Board to modify the program.